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Global Analysis Report

Sector Trend Analysis

Confectionery
in the United Arab Emirates

April 2017

Executive summary

- The confectionery market in the United Arab Emirates (UAE) expanded significantly from 2012 to 2016, landing at the value sales of US$481.9 million in 2016. Over the 2017 to 2021 forecast period, confectionery sales are expected to experience strong growth to reach over US$800 million in 2021.
- Chocolate confectionery was the largest confectionery subsector in the UAE, representing 77.3% of total confectionery sales. The market also witnessed the fastest growth of 13.9% over the 2012 to 2016 period among all subsectors.
- The confectionery market in the UAE is dominated by the Mars Inc., who held a 38.6% market share in 2016. The top ten players were mostly large international conglomerates who have deep financial resources to actively market and build strong distribution networks. In addtion, those companies also benefit from their long historical presence and reputation among local consumers.
- Confectionery products that are positioned as an aid to oral health or healthier lifestyles continued to appeal to consumers in 2016. Manufacturers are focussing on innovative products that have health and wellness benefits.

**Note:* *For detailed definition of the confectionery segments in this report, please see the Annex on page 10.*

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Consumer attitudes and economic drivers

The United Arab Emirates (UAE) has a vast number of expatriate workers, and nearly 90% of the total population are foreigners. The largest immigrant group are Indians, accounting for 30% of the total population. Many expatriates came to the UAE without families, which has also led to the gender imbalance: 73% of the total population were males in 2016.

According to Euromonitor International, 44.5% of females and 31.9% of males over the age of 15 in the UAE were obese (body mass index of 30 kg/m^2 or more) in 2016. Obesity has raised the potential for disease. For instance, the percentage of the population aged from 20 to 79 with diabetes raised from 14.6% to 15.6% in 2016. As a result, more consumers are demanding health and wellness foods, and the UAE's Ministry of Health is heavily expanding facilities to support its health sector.

A large influx and outflow of expatriates in the UAE each year makes it difficult to identify consumer characteristics. As a result, internationally recognized brands are more likely to leverage their reputation and achieve significant growth in the market.

Retail environment

The confectionery market in the UAE expanded significantly from 2012 to 2016, landing at the value sales of US$481.9 million in 2016. This growth was largely attributable to the sales increase in the chocolate confectionery subsector, which continued to benefit from innovations in packaging formats. Chocolate confectionery also remained as the leading subsector in 2016, representing 77.3% of total confectionery sales.

Over the forecast period of 2017 to 2021, confectionery sales are expected to experience growth to reach over US$800 million in 2021. The growth will likely slow down during the future period, partially due to the rise in health issues caused by obesity, such as diabetes. Euromonitor International suggested that positioning products with health and wellness claims will be increasingly appealing to consumers in the future.

Historic retail sales of confectionery in the UAE, in the US$ millions and '000 tonnes

Category	2012	2013	2014	2015	2016	% CAGR* 2012-16
Value sales in US$ millions (current prices, fixed 2016 exchange rate)						
Confectionery	299.4	347.5	383.5	429.3	481.9	12.6
Chocolate confectionery	221.0	261.8	289.7	328.1	372.5	13.9
Sugar confectionery	45.2	49.7	54.6	59.5	63.8	9.0
Gum	33.2	36.1	39.3	41.8	45.5	8.2
Volume sales in '000 tonnes						
Confectionery	17.1	19.7	21.4	23.4	25.5	10.5
Chocolate confectionery	12.6	14.8	16.1	17.8	19.6	11.7
Sugar confectionery	3.4	3.7	4.1	4.3	4.5	7.3
Gum	1.1	1.2	1.2	1.3	1.3	4.3

Source: *Euromonitor International, 2016* ****CAGR:*** *Compound annual growth rate.*

Forecast retail sales of confectionery in the UAE, in the US$ millions and '000 tonnes

Category	2017	2018	2019	2020	2021	% CAGR* 2017-21
Value sales in US$ millions (current prices, fixed 2016 exchange rate)						
Confectionery	544.3	613.0	690.2	771.8	852.7	11.9
Chocolate confectionery	425.0	483.1	548.7	618.2	686.6	12.7
Sugar confectionery	69.0	74.6	80.7	86.5	92.5	7.6
Gum	50.3	55.4	60.8	67.1	73.6	10.0
Volume sales in '000 tonnes						
Confectionery	27.9	30.3	32.8	35.4	38.2	8.2
Chocolate confectionery	21.7	23.8	26.1	28.4	30.8	9.1
Sugar confectionery	4.7	4.9	5.1	5.3	5.5	4.0
Gum	1.4	1.5	1.6	1.7	1.8	6.5

Source: *Euromonitor International, 2016* ****CAGR:*** *Compound annual growth rate.*

The confectionery market in the UAE was dominated by Mars Inc., who held a 38.6% share of the market in 2016. Many well regarded international brands are owned by this company including Galaxy/Dove, Wrigley's, M&M's, Snickers and Twix. The top ten players were mostly large international conglomerates who have deep financial resources to actively market and build strong distribution networks. In addtion, those companies also benefit from their long historical presence and reputation among local consumers. IFFCO Group is the only local company within the top ten players. According to Euromonitor International, the company benefits from the appreciation from local consumers, its strong distribution networks, and deep relationship with distributors.

Top ten confectionery companies and their top brand in the UAE
% breakdown based on company retail value sales

Company	Brand	2012	2013	2014	2015	2016	% CAGR* 2012-16
Mars Inc.	Galaxy/Dove	34.1	34.8	34.8	36.5	38.6	3.1
Ferrero Group	Kinder	9.4	9.9	11.0	12.0	13.0	8.4
Mondelez International Inc.	Cadbury	8.2	8.3	8.5	8.2	8.5	0.9
Nestlé SA	Kit Kat	8.8	8.5	8.5	8.5	8.4	-1.2
Perfetti Van Melle Group	Mentos	5.7	5.5	5.5	5.4	5.3	-1.8
Chocoladefabriken Lindt & Sprüngli AG	Lindt	4.7	4.5	4.7	4.7	4.8	0.5
Storck KG, August	Werther's Original	1.5	1.6	1.6	1.6	1.6	1.6
IFFCO Group	Tiffany Break	1.3	1.3	1.3	1.3	1.4	1.9
Haribo GmbH & Co. KG	Haribo	1.1	1.1	1.1	1.1	1.1	0.0
Hershey Co., The	Kisses	1.1	1.0	1.0	0.9	0.9	-4.9

Source: *Euromonitor International, 2016* ****CAGR:*** *Compound annual growth rate.*

The confectionery products are available across all types of retailers, while a wider variety of products usually appear in the hypermarkets and supermarkets. Manufacturers are also actively approaching consumers online or via smartphone to inform them of new products and discounts.

Chocolate confectionery

Chocolate confectionery remained as the largest confectionery subsector in the UAE and witnessed the fastest growth over the 2012 to 2016 period. The growth partially came from the popularity of new packaging formats, such as fun-size, on-the-go, and family size packs, according to Euromonitor. Formats such as bundles and family size packs were more appealing to families due to their economy pricing.

Chocolate with toys recorded the highest value growth of 19.1% among all chocolate confectionery segments. Again, the growth was partially attributable to a variety of packaging formats, which appealed to families with young children.

The variety of flavours in the overall chocolate confectionery has been growing, but there is no distinct preference among the UAE consumers. However, plain milk has been a preferred type of chocolate tablet in the UAE, accounting for a 52.7% retail value share of tablets in 2016. Plain dark chocolate tablets recorded the highest growth of 4.7% within all chocolate tablet flavours, mostly due to the recent health and wellness trends. With a 2.4% of retail value sales of tablets, there is still large room to grow within the dark chocolate tablet market.

Historic retail value sales of chocolate confectionery in the UAE by segment, US$ millions, current prices – fixed 2016 exchange rate

Category	2012	2013	2014	2015	2016	% CAGR* 2012-16
Chocolate confectionery	221.0	261.8	289.7	328.1	372.5	13.9
Countlines	90.3	105.9	117.3	135.6	157.5	14.9
Boxed assortments	48.7	54.2	61.2	69.5	78.4	12.6
Tablets	50.6	62.8	67.3	72.4	78.4	11.6
Chocolate pouches and bags	23.0	28.9	32.2	36.9	42.5	16.6
Chocolate with toys	6.6	7.9	9.4	11.3	13.3	19.1
Seasonal chocolate	1.9	2.2	2.2	2.3	2.4	6.0
Other chocolate confectionery	0.0	0.0	0.0	0.0	0.0	0.0

Source: *Euromonitor International, 2016* ****CAGR:*** *Compound annual growth rate.*

Forecast retail value sales of chocolate confectionery in the UAE by segment, US$ millions, current prices – fixed 2016 exchange rate

Category	2017	2018	2019	2020	2021	% CAGR* 2017-21
Chocolate confectionery	425.0	483.1	548.7	618.2	686.6	12.7
Countlines	183.6	212.7	245.5	278.7	312.0	14.2
Boxed assortments	88.9	100.1	112.6	125.5	138.1	11.6
Tablets	85.0	92.9	101.8	112.5	122.1	9.5
Chocolate pouches and bags	49.4	57.1	65.8	75.5	85.9	14.8
Chocolate with toys	15.4	17.6	20.0	22.7	25.2	13.1
Seasonal chocolate	2.6	2.8	3.0	3.2	3.4	6.9
Other chocolate confectionery	0.0	0.0	0.0	0.0	0.0	0.0

Source: *Euromonitor International, 2016* ****CAGR:*** *Compound annual growth rate.*

The chocolate confectionery subsector is expected to record value sales growth of 12.7% over the 2017 to 2021 forecast period. Chocolate with toys would be one of the most prospective segments in the UAE, given the large family size and high birthrate. Also, products with health claims and smaller fun-size will continue to draw popularity in future years.

Among the top five key players in the chocolate confectionery market, Mars maintained its leadership with a retail value share of 41.7% in 2016. In addition to its ownership of few globally recognized brands, the company has recently introduced a popular on-the-go packaging format for its M&M's brand. Ferrero recorded the fastest growth over the 2012 to 2016 review period, which was attributable to its new packaging for Kinder, designed separately for boys and girls. Both companies experienced sales growth due to new packaging formats, indicating one of the main consumer trends in the UAE in 2016.

Premium chocolate brands such as Lindt & Sprüngli are mostly purchased by Western expatriates and some wealthy Emiratis. Chocoladefabriken Lindt & Sprüngli AG experienced a slight contraction in the value share, but remained relatively stable in the review period.

Intense competition exists in this subsector; leading companies are developing more innovative packaging formats and a variety of chocolate confectionery products to appeal to the local consumers.

Top five chocolate confectionery companies and their top brand in the UAE
% breakdown based on company retail value sales

Company	Brand	2012	2013	2014	2015	2016	% CAGR* 2012-16
Mars Inc.	Galaxy/Dove	37.1	37.8	37.7	39.5	41.7	3.0
Ferrero Group	Kinder	12.2	12.6	14.0	15.0	16.1	7.2
Nestlé SA	Kit Kat	11.9	11.3	11.3	11.1	10.9	-2.2
Mondelez International Inc.	Cadbury	10.1	10.1	10.4	10.4	10.7	1.5
Chocoladefabriken Lindt & Sprüngli AG	Lindt	6.3	6.0	6.2	6.2	6.2	-0.4

Source: *Euromonitor International, 2016* ****CAGR:*** *Compound annual growth rate.*

Sugar confectionery

Sugar confectionery was the second largest subsector within the UAE confectionery market. The category was relatively small and niche, with a 13.2% retail value share of the UAE confectionery market in 2016. This may be due to the majority of its products being positioned as children-friendly, and local consumers regarding them as being targeted at children. As a result, sugar confectionery has a smaller consumer base compared to chocolate confectionery.

Strong growth and high sales were recorded in this subsector mostly due to the health and wellness trends, and the strong performance of certain brands, such as Werther's Original, Smint and Tic Tac. Pastilles, gums, jellies, and chews was the largest segment due to the popularity of brands such as Tic Tac, positioned as an aid to oral health; toffees, caramels, and nougat recorded the second highest value growth largely because of the sugar free caramels introduced by Werther's Original; medicated confectionery also grew fast over the 2012 to 2016 review period due to the popularity of Ricola Lozenges.

The other sugar confectionery product that is significant in the UAE is a local traditional sweet known as halawa which is very popular among the local Arab population.

Historic retail value sales of sugar confectionery in the UAE by segment, US$ millions, current prices – fixed 2016 exchange rate

Category	2012	2013	2014	2015	2016	% CAGR* 2012-16
Sugar confectionery	45.2	49.7	54.6	59.5	63.8	9.0
Pastilles, gums, jellies and chews	19.9	21.7	23.3	25.6	27.8	8.7
Toffees, caramels and nougat	5.3	5.8	6.4	7.1	7.8	10.1
Mints	5.7	6.1	6.5	7.0	7.5	7.1
Boiled sweets	2.8	3.1	3.4	3.8	4.0	9.3
Medicated confectionery	2.6	2.7	2.8	2.9	3.1	4.5
Lollipops	2.2	2.3	2.5	2.7	2.9	7.2
Liquorice	0.4	0.4	0.5	0.5	0.5	5.7
Other sugar confectionery	6.5	7.6	9.2	9.8	10.2	11.9

Source: *Euromonitor International, 2016* ****CAGR:*** *Compound annual growth rate*

Forecast retail value sales of sugar confectionery in the UAE by segment, US$ millions, current prices – fixed 2016 exchange rate

Category	2017	2018	2019	2020	2021	% CAGR* 2017-21
Sugar confectionery	69.0	74.6	80.7	86.5	92.5	7.6
Pastilles, gums, jellies and chews	30.6	33.5	36.9	40.4	43.9	9.4
Toffees, caramels and nougat	8.5	9.2	10.0	10.8	11.6	8.1
Mints	8.1	8.7	9.4	10.0	10.5	6.7
Boiled sweets	4.3	4.6	4.9	5.2	5.4	5.9
Medicated confectionery	3.4	3.7	4.0	4.3	4.6	7.8
Lollipops	3.1	3.3	3.6	3.9	4.1	7.2
Liquorice	0.6	0.6	0.7	0.7	0.8	7.5
Other sugar confectionery	10.5	10.8	11.1	11.1	11.5	2.3

Source: *Euromonitor International, 2016* ****CAGR:*** *Compound annual growth rate*

As shown in the table on the following page, Perfetti Van Melle was the most prominent company within the UAE sugar confectionery market in 2016, due to its brand Smint's strong leadership in mints. Storck was in the second place and benefited from its brand Werther's Original with its sugar-free positioning, which appealed to both adults and children. These two companies own international brands that are popular with the local consumers and can leverage the brand reputation in the UAE sugar confectionery market.

Ferrero achieved the strongest growth over the 2012 to 2016 review period because of the popularity of its Tic Tac brand. According to Euromonitor International, the brand is welcomed by both adults and children due to its recent introduction of additional flavours and oral health aid positioning.

Top five sugar confectionery companies and their top brand in the UAE
% breakdown based on company retail value sales

Company	Brand	2012	2013	2014	2015	2016	% CAGR* 2012-16
Perfetti Van Melle Group	Smint	17.3	17.2	16.9	16.8	17.1	-0.3
Storck KG, August	Werther's Original	7.6	8.2	8.5	8.6	9.2	4.9
Mars Inc.	Skittles	6.9	7.0	7.2	7.6	8.1	4.1
Haribo GmbH & Co. KG	Haribo	7.5	7.6	7.8	7.8	8.1	1.9
Ferrero Group	Tic Tac	2.8	3.0	3.3	3.9	4.5	12.6

Source: *Euromonitor International, 2016* ****CAGR:*** *Compound annual growth rate.*

The sugar confectionery in the UAE is expected to continue its growth over the 2017 to 2021 forecast period. Pastilles, gums, jellies and chews segment is expected to remain its leadership to reach US$43.9 million in 2021. Euromonitor International is anticipated that the Pick and Mix trend led by Haribo will gain more market presence within the pastilles, gums, jellies and chews segment, especially with the recent opening of the local office for Haribo.

Since many well-known international brands have already been in this subsector, fewer new products will be introduced in the future period. Rather, product extension on current brands with health and wellness positioning will be more common in the market.

Gum

Gum was the smallest subsector within the UAE confectionery market, with value sales of US$45.5 million in 2016. The market can still see the strong growth within this subsector, with a growth rate of 8.2% over the 2012 to 2016 review period. According to Euromonitor International, the strong growth was triggered by gum's fashionable image and the perception of benefiting oral health.

Chewing gum was in the dominant position within the gum subsector, and recorded the highest growth over the review period. The segment benefits from its sugar-free version of the products which are positioned as an aid to promote oral health. Relatively, bubble gum achieved smaller retail value sales. It is because the bubble gum is perceived by local consumers as a children confectionery, and is not good for oral health which is against the current health and wellness trends.

Historic retail value sales of gum in the UAE by segment,
US$ millions, current prices – fixed 2016 exchange rate

Category	2012	2013	2014	2015	2016	% CAGR* 2012-16
Gum	33.2	36.1	39.3	41.8	45.5	8.2
Chewing gum	29.1	31.8	34.8	37.0	40.5	8.6
Bubble gum	4.1	4.3	4.5	4.8	5.0	5.1

Source: *Euromonitor International, 2016* ****CAGR:*** *Compound annual growth rate.*

Forecast retail value sales of gum in the UAE by segment, US$ millions, current prices – fixed 2016 exchange rate

Category	2017	2018	2019	2020	2021	% CAGR* 2017-21
Gum	50.3	55.4	60.8	67.1	73.6	10.0
Chewing gum	45.0	49.7	54.9	61.0	67.2	10.5
Bubble gum	5.3	5.6	5.9	6.2	6.4	4.8

Source: *Euromonitor International, 2016* ****CAGR:*** *Compound annual growth rate.*

Peppermint and spearmint remained the most preferred gum flavour among the UAE consumers. Recently, the fruit flavour such as strawberry and watermelon is on the rise due to the popularity of Mentos gum products. Most of the gum products in the UAE are offered in the stick format, while pellets offered in plastic containers continue to appeal to consumers in recent years. As a result, innovation in products with convenient packaging formats, additional flavours or being positioned as an aid for healthier lifestyles will help companies gain more popularity among the local consumers.

Top five gum companies and their top brand in the UAE % breakdown based on company retail value sales

Company	Brand	2012	2013	2014	2015	2016	% CAGR* 2012-16
Mars Inc.	Wrigley's	50.5	51.7	51.9	53.4	55.9	2.6
Perfetti Van Melle Group	Mentos	27.9	29.1	30.0	31.9	32.7	4.0
Kervan Gida San ve Tic AS	Coolfresh	0.3	0.2	0.2	0.0	0.0	*N/C
Mondelez International Inc.	Chiclets	4.2	4.0	3.8	0.0	0.0	*N/C
Al Jazirah Food Processing Co. Ltd.	Gandour	1.0	0.0	0.0	0.0	0.0	*N/C

Source: *Euromonitor International, 2016* ****CAGR:*** *Compound annual growth rate.* ****N/C:*** *not calculable.*

The UAE gum market was dominated by two major players, Mars Inc. and Perfetti Van Melle, with a total of 88.6% retail value share within the gum subsector. The two international conglomerates not only have the deep resources and popular brands but also benefit from product extension with additional flavours and health and wellness aspects. According to Euromonitor International, two players will continue to maintain their dominance of the gum market. It is also anticipated that innovations in the gum subsector will offer more products with health claims such as gum with teeth whitening properties.

Conclusion

With affluent consumers, large family size and high birthrate, the UAE market represents an opportunity for international exporters. The confectionery market is expected to continue its high growth over the 2017 to 2021 forecast period.

More manufacturers will likely continue to innovate by introducing new products with added value, such as additional flavours, new packaging formats and health and wellness claims. The manufacturers who plan to exclusively target children will likely find limited appeal, while those who will follow the health and wellness trends will benefit from the broadened consumer base, and gain more opportunities.

For more information

International Trade Commissioners can provide Canadian industry with on-the-ground expertise regarding market potential, current conditions and local business contacts, and are an excellent point of contact for export advice.

- **Overview of Trade Commissioner Services in the United Arab Emirates**
  http://www.tradecommissioner.gc.ca/eng/offices-united-arab-emirates.jsp

- **Find a Trade Commissioner**
  www.tradecommissioner.gc.ca/eng/find-trade-contacts.jsp

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- ats-sea.agr.gc.ca

For more information on the 2017 Gulfood exhibition in Dubai, please contact:

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Resources

Euromonitor International Database (2017).

Euromonitor International (2016). *Chocolate Confectionery in the United Arab Emirates.*

Euromonitor International (2016). *Gum in the United Arab Emirates.*

Euromonitor International (2016). *Sugar Confectionery in the United Arab Emirates.*

Euromonitor International (2013). *UAE Consumers in 2020: A look into the future.*

Annex – definitions

The following are the detailed definitions employed by Euromonitor for each confectionery category.

Chocolate confectionery

- **Chocolate pouches and bags:** These bagged products are either chocolate- or sugar-coated with a solid, liquid or soft centre. Soft candies with a chocolate centre and chocolate-coated candies are also included. Chocolate eggs are excluded.
- **Boxed assortments:** This is the aggregation of standard boxed assortments (whether budget or premium, including assortments in jars and tins) and twist-wrapped miniatures (boxed chocolates derived from an existing brand whose format has been miniaturized and is typically individually twist-wrapped).
- **Chocolate with Toys:** This segment includes chocolate products sold with a toy or surprise. These include chocolate eggs with gifts contained inside, and toys with chocolate sold inside.
- **Countlines:** This segment includes chocolate bars that are eaten as snacks. Many are filled and unsegmented (i.e. not pre-cut). Countlines can be sold in a diversity of formats, including multipacks or mini sizes. Other products in this category include wafer bars and cereal/muesli bars coated with chocolate. However, cereal/muesli bars, which are nutritionally fortified and coated with chocolate are excluded.
- **Seasonal chocolate:** This segment includes selection boxes and hollow molded figures for seasonal occasions/holidays (Easter, Valentine's Day, Christmas, Halloween, etc.). Chocolate eggs, which may be large, small or mini, packaged or unpackaged, filled or unfilled, are also included. However, eggs with a surprise are excluded – see Chocolate with Toys.
- **Tablets:** This segment includes molded and segmented chocolate bars in a wide range of sizes from bite-size to "family bars"; some are filled with nuts and/or raisins and made of different types of chocolate. Tablets in countline format are included. "Fun size" tablets are also included here, be they sold individually or in multipacks.
- **Other chocolate confectionery:** Chocolate products that do not fall within the previous chocolate definitions are included (e.g. chocolate lollipops, chocolate-flavoured lollipops, liquid chocolate, chocolate foam, etc.).

Sugar confectionery

- **Boiled sweets:** Any flavoured candies made from boiled sugar and resulting in hard or soft drops; mints and lollipops are excluded.
- **Liquorice:** This covers liquorice-flavoured products, principally in the form of boiled sweets and chews.
- **Lollipops:** Any sweets sold on sticks are included. Also includes lollipops containing a chewing gum or other confectionery centre.
- **Medicated confectionery:** Any sugar confectionery product containing herbs and/or plants extracts. Medicated mints fall into this subsector.
- **Mints:** Includes both standard mints (any sweets flavoured with mint, regardless of type or texture [i.e. size, sugarized, sugar-free, soft, hard, etc.]) and power mints/breath fresheners (characterized by

a stronger mint taste due to the addition of ingredients such as xylitol and flavour enhancements, and/or a much higher concentration of mint).

- **Pastilles, gums, jellies and chews:** Any flavoured soft/chewy candies made from fruit juice boiled with sugar and gelatine. Jellied fruits are included. Pastilles, gums, jellies and chews containing liquorice or liquorice flavours are excluded.
- **Toffees, caramels and nougat:** Toffees are hard, chewy candies made of brown sugar or molasses and butter or caramelized sugar cooled in thin sheets. Caramels are smooth chewy candies made with sugar, butter, cream or milk. Nougats are chewy confections made from a sugar or honey paste into which nuts and/or fruit are typically mixed.
- **Other sugar confectionery:** Any sugar confectionery product not included above, such as marshmallow or sweet liquid concentrates sold as candies.

Gum

- **Bubble gum:** Similar product to chewing gum but specifically marketed at children/adolescents, with blowing bubbles as the principal marketing theme. Both sugarized and sugar-free bubble gum are included.
- **Chewing gum:** This is the aggregation of sugarised and sugar-free gum.
- **Sugar-free chewing gum:** Any flavoured and sugar-free gum which is chewed but not swallowed falls under this heading. Functional sugar-free gum is also included here.
- **Sugarized chewing gum:** Any flavoured and sugarized gum which is chewed but not swallowed falls under this heading. Functional sugarized gum is also included here.

SECTOR TREND ANALYSIS, CONFECTIONERY IN THE UNITED ARAB EMIRATES
Global Analysis Report

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